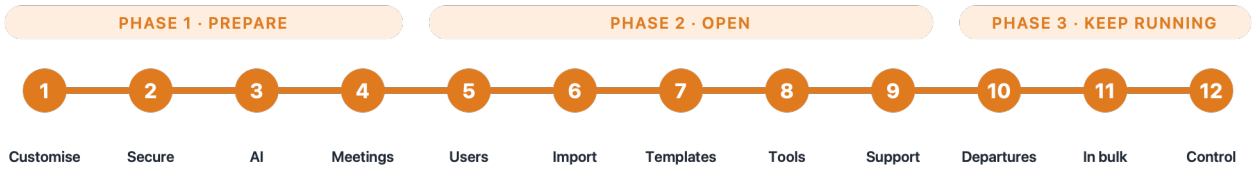
Administrator Guide

Prepare, open and keep running
your organisation's Perfony account



PHASE 1 · PREPARE

Chapters 1 to 4

Customise, secure, set up AI and meetings

PHASE 2 · OPEN

Chapters 5 to 9

Users, imports, templates, tools and support

PHASE 3 · KEEP RUNNING

Chapters 10 to 12

Arrivals and departures, bulk management, access control

⏱️ About 3 hours in all · ✅ A getting-started checklist

perfony

November 2026 edition

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Your role as administrator

You are the administrator of your organisation's Perfony account. Your mission: prepare the account, open access, then keep it running day to day. This guide takes you through these three stages.

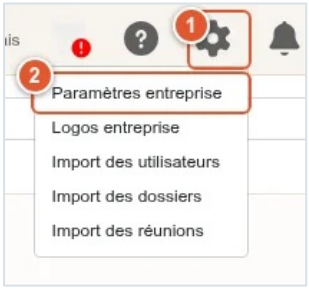
Who is an administrator?

- An administrator has an **Executive licence**, plus **administrator rights**.
- The person who created the Perfony account is an administrator by default.
- An account can have **several administrators**. Appoint at least two: you will never be stuck during an absence.

What you can do

- **Manage users and their licences**, with the Users menu.
- **Set up the account**: security, artificial intelligence, meetings, connectors, logo.
- **Import** your users, folders and meetings, and **edit in bulk**.
- **Manage billing** for your organisation's Perfony subscription.

Your tools are behind the **gear wheel**, at the top right of the screen, and in the **Users** menu, on the left.



1	**The gear wheel**	Visible to administrators, at the top right.
2	**Company settings**	All the account's settings. Just below: logos and imports.

Groups, folder templates and dashboards are explained in steps 8 and 9 of the "Getting started with Perfony" guide. This guide refers to them in chapter 7.

Getting-started checklist

The administrator's main tasks, in order. Tick each one when it is done: you see at a glance where you stand, and what is left to do before the launch.

PHASE 1 · PREPARE THE ACCOUNT

- ☐ **Customise your account**: add your logo and tour the company settings — Ch. 1 · p. 5
- ☐ **Secure access**: set up login, passwords and two-factor authentication — Ch. 2 · p. 7
- ☐ **Set up artificial intelligence**: choose your organisation's AI features — Ch. 3 · p. 10
- ☐ **Set up meetings**: configure recurring meetings and their evaluation — Ch. 4 · p. 13

PHASE 2 · OPEN ACCESS

- ☐ **Create users**: create accounts and assign licences — Ch. 5 · p. 16
- ☐ **Import what you already have**: bring in users, folders, actions and meetings from Excel — Ch. 6 · p. 19
- ☐ **Prepare folder templates**: set up groups, custom fields and templates — Ch. 7 · p. 21
- ☐ **Roll out the tools**: Outlook, Teams, OneDrive, SharePoint, Google Drive, AI assistants — Ch. 8 · p. 24
- ☐ **Support your users**: share the “Getting started” guide and plan the launch — Ch. 9 · p. 27

PHASE 3 · KEEP THE ACCOUNT RUNNING

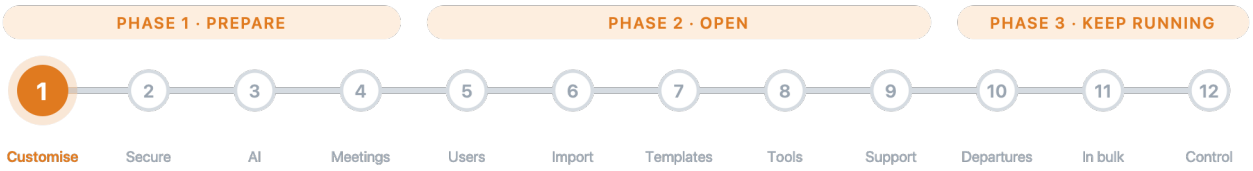
- ☐ **Manage arrivals and departures**: deactivate an account and transfer its responsibilities — Ch. 10 · p. 29
- ☐ **Manage in bulk**: change several users or folders at once — Ch. 11 · p. 32
- ☐ **Control access**: regularly check that everyone has the right rights — Ch. 12 · p. 35

> 💡 **Keep your ticks**
>
> First save this PDF to your computer, then open it from that file: your ticked boxes will be kept.

PHASE 1 · PREPARE THE ACCOUNT ⏱ 15 minutes

Chapter 1 · Customise your account

Your logo and a tour of the company settings



Before inviting anyone, take a quarter of an hour to give the account your colours and find out where the settings are. You will come back to them in the following chapters.

🎯 **By the end of this chapter, you will know how to…**

- ✓ open the company settings;
- ✓ display your organisation's logo;
- ✓ find the main groups of settings.

🏢 The company settings

Click the **gear wheel** at the top right, then **Company settings**. These settings apply to **the whole account**: don't confuse them with folder templates, which only concern some folders.

The settings are grouped into cards:

- **Security**: login, passwords, two-factor authentication, data retention (chapter 2);
- **Third-party software**: connectors (chapter 8) and artificial intelligence (chapter 3);
- **Meetings**: recurring meetings and evaluation (chapter 4);
- **Actions**: for example the automatic deletion of cancelled actions.

> 💡 **Keep a record**
> Each setting applies to all users. Note what you change, when and why: you will be able to explain it, or go back.

🎨 Your logo

In the gear wheel menu, choose **Company logos** and upload your organisation's logo. It replaces Perfony's at the top left of the screen, for all users. Clicking the logo always takes you back to the home page.

✋ YOUR TURN Give the account your colours

1. Gear wheel, then **Company logos**: upload your organisation's logo.
2. Reload the page: your logo appears at the top left.
3. Gear wheel, then **Company settings**: look through the Security, Third-party software, Meetings and Actions cards, without changing anything for now.

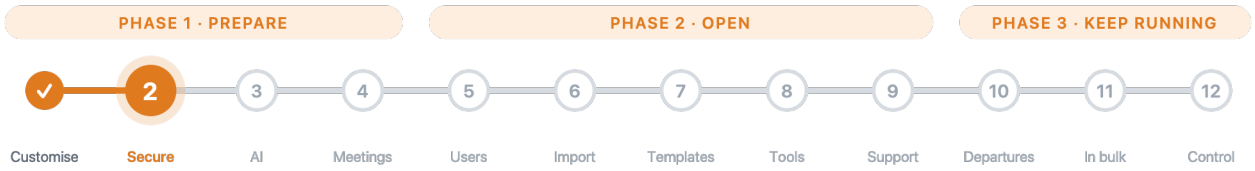
☐ **Tick when done!** Expected result: your account carries your logo, and you know where the settings are.

> 🎉 **Chapter 1 complete!**
> → **Next chapter: Secure access.**
>
> 📘 **Learn more in the Academy**
> - The administrator role · The ribbon and settings

PHASE 1 · PREPARE THE ACCOUNT ⏱ 20 minutes

Chapter 2 · Secure access

Login, passwords, two-factor authentication and data



Perfony protects your data: encryption, GDPR compliance, regular security testing. It's up to you to adjust the access rules to your organisation's policy. Everything happens in the Security card of the company settings.

🎯 **By the end of this chapter, you will know how to…**

- ✓ set the login and password rules;
- ✓ offer or require two-factor authentication;
- ✓ choose login with Microsoft 365 or Google;
- ✓ set how long accounts and data are kept.

🔐 Login rules

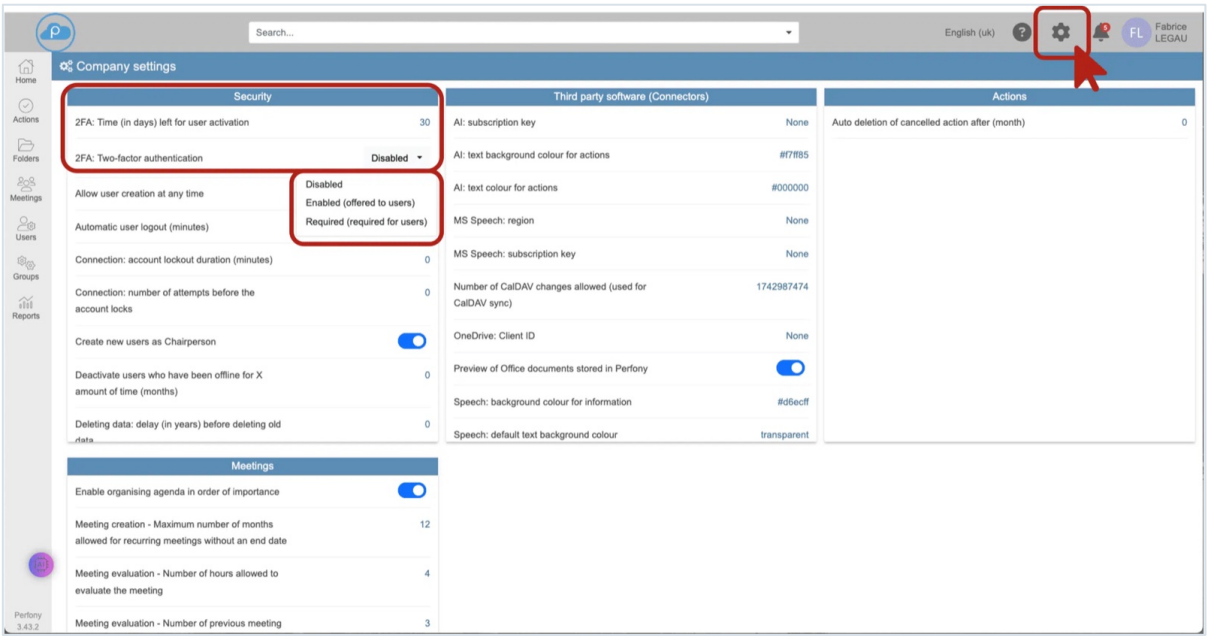
- **Automatic logout** after a period of inactivity.
- **Account lockout** after a number of failed login attempts, and how long the lockout lasts.
- **Password composition**: new rules apply the next time each person changes their password.
- **Password lifetime**: when it expires, Perfony asks the user to choose a new one as soon as they log in.

📱 Two-factor authentication (2FA)

As well as the password, the user enters a 6-digit code that changes every 30 seconds, given by an app such as Microsoft Authenticator, Google Authenticator or FreeOTP+. Three settings are possible:

- **Disabled**;
- **Offered**: each person chooses whether to switch it on;

- **Required**: you set a deadline in days. Before the deadline, a banner invites users to switch it on; after it, a user can no longer get in without setting it up.



The company settings, with the Security card and the two-factor authentication setting.

> 💡 **A user has lost their phone?**
>
> In the Users menu, open their profile and click “Reset two-factor authentication”. They will be able to log in again and set it up once more.

🔑 Login with Microsoft 365 or Google

With single sign-on (SSO), your users get into Perfony with their **Microsoft 365** or **Google** account, with no Perfony password: in the application, in Teams and in the Outlook add-in. The password and two-factor authentication are then managed by Microsoft or Google.

Setting it up is done with your IT department. For Microsoft 365, they register an application in Microsoft Entra ID, then send Perfony the application ID and the directory ID. The Perfony project manager supports you: the detailed procedure is in the Academy.

🗄️ Accounts and data retention

- **User creation by pilots**: allow them, or not, to create accounts from their folders and meetings.
- **Default rights**: choose whether new users are created with Pilot rights.

- **Automatic deactivation** of accounts with no login for a chosen period. An email warns the user 15 days beforehand.
- **Anonymisation** of deactivated accounts: surname, first name and email are replaced, but the history of actions and meetings remains readable.
- **Deletion of old data**: cancelled or completed actions, closed meetings, archived folders.

> ⚠️ **Careful with automatic deletions**
> They are final. Choose the time limits with your organisation's data protection officer, and check the current value of each setting before changing it.

✋ YOUR TURN — Set up security

1. Gear wheel, **Company settings**, **Security** card.
2. Choose the two-factor authentication setting: at least “offered”.
3. Check the automatic logout, the lockout after failures and the password rules.
4. Switch on two-factor authentication for your own account: in your settings, **Authentication** page.

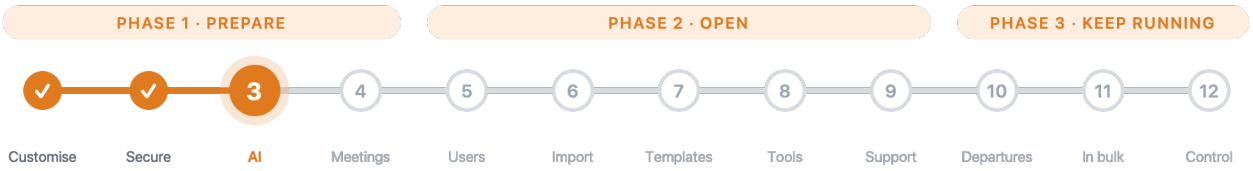
☐ **Tick when done!** Expected result: the access rules match your organisation's policy, and your account is protected.

> 🎉 **Chapter 2 complete!**
> ➜ **Next chapter: Set up artificial intelligence**.
>
> 📘 **Learn more in the Academy**
> - Security settings · Two-factor authentication
> - Connect Perfony and Microsoft 365 · Google login
> - Your password

PHASE 1 · PREPARE THE ACCOUNT ⏱ 10 minutes

Chapter 3 · Set up artificial intelligence

Choose your organisation's AI features



Perfony's artificial intelligence is on by default. As administrator, you choose the features your organisation uses, and you can even run it through your own Microsoft Azure subscription.

🎯 **By the end of this chapter, you will know how to…**

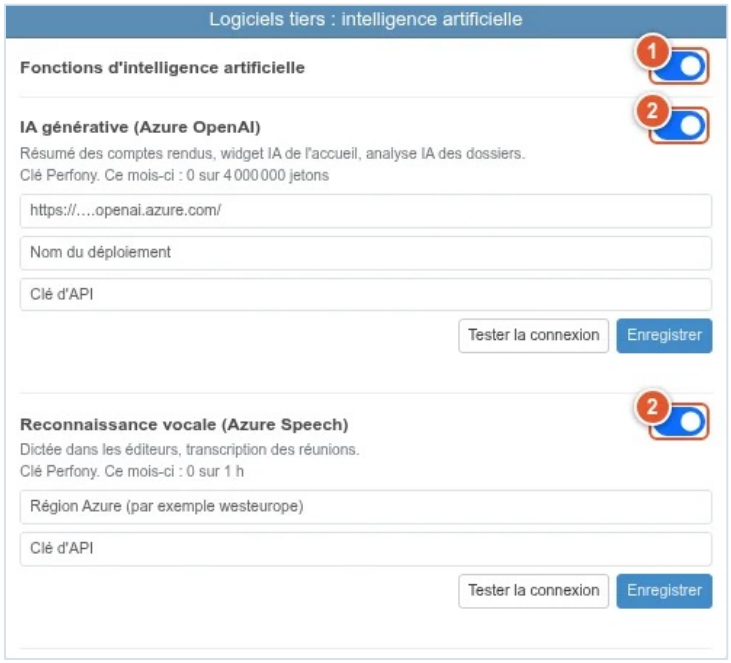
- ✓ switch each AI feature on or off;
- ✓ follow the month's usage;
- ✓ use your organisation's Azure subscription, if you wish.

🤖 The AI features

Gear wheel, **Company settings**, **Third-party software: artificial intelligence** card. A main switch turns all AI on or off at once, then each service has its own:

- **generative AI**: summary of minutes, AI widget on the home page, AI analysis of folders;
- **speech recognition**: dictation and meeting transcription;
- **detection of decisions and actions** in the minutes.

A feature that is switched off disappears from every user's screen as soon as they reload Perfony. Under each service, the card shows the month's usage and the quota.



1	**Main switch**	Turns all AI features on or off.
2	**One switch per service**	Generative AI, speech recognition…

> 💡 **What about the Perfony assistant?**
> The help bubble at the bottom left of the screen also uses AI. If you switch AI off, it disappears for all users.

☁ Your own Azure subscription

If your organisation has a Microsoft Azure subscription, your content can be processed in that subscription, with no Perfony quota. Your IT department gives you the information you need:

- **generative AI**: the address of the Azure OpenAI resource, the deployment name and an API key;
- **speech recognition**: the region and the key of the Azure Speech resource.

Enter them in the card, click **Test connection**, then **Save**. To go back to the key supplied by Perfony, click **Revert to the Perfony key**.

⚠️ **Good to know**

Once saved, the key is never shown again: only its last four characters appear. If it changes in Azure, enter the new one.

✋ YOUR TURN Choose your AI features

1. Open the **Third-party software: artificial intelligence** card.
2. Keep on the features approved by your organisation, switch off the others.
3. Note the month's usage and the quota of each service.

☐ **Tick when done!** Expected result: the AI features match your organisation's choices.

🎉 **Chapter 3 complete!**

→ **Next chapter: Set up meetings.**

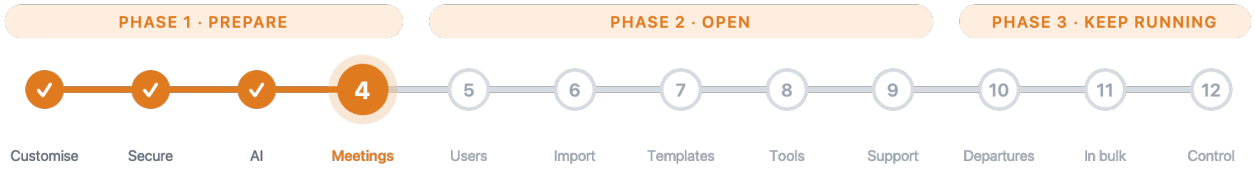
📘 **Learn more in the Academy**

- Set up artificial intelligence · The Perfony assistant · Meetings with AI

PHASE 1 · PREPARE THE ACCOUNT 10 minutes

Chapter 4 · Set up meetings

Recurring meetings and meeting evaluation



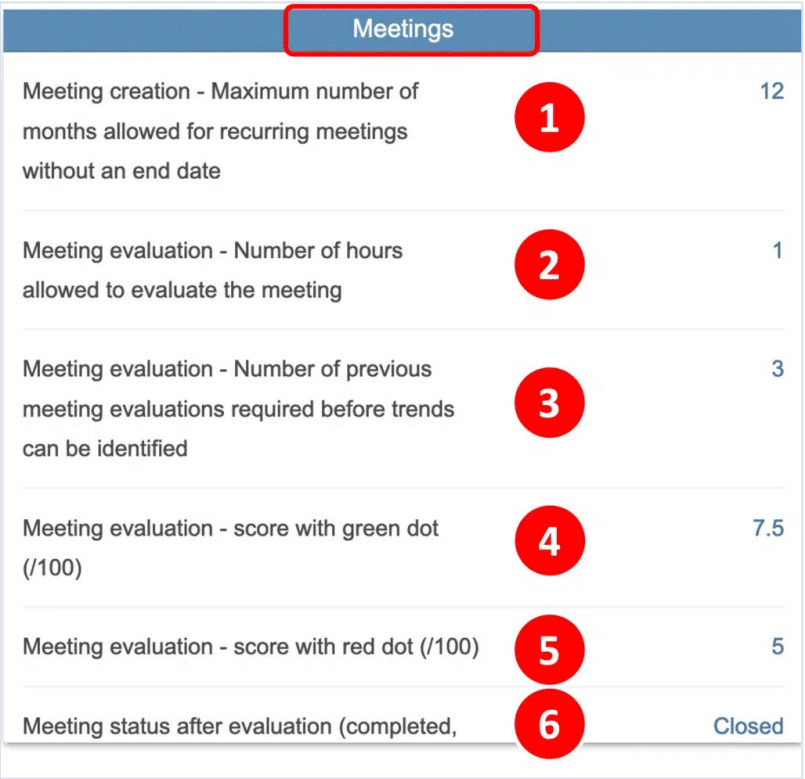
Perfony helps your teams hold more effective meetings, in particular through participants' evaluation of meetings. You set the rules for the whole organisation.

By the end of this chapter, you will know how to…

- ✓ limit the length of recurring meetings with no end date;
- ✓ set up meeting evaluation and its thresholds;
- ✓ choose a meeting's status after its evaluation.

The Meetings card

Gear wheel, **Company settings**, **Meetings** card:



1	**Recurring meetings**	Maximum number of months created in advance for a recurring meeting with no end date.
2	**Evaluation period**	The time, in hours, given to participants to evaluate the meeting.
3	**Trend**	The number of evaluations needed before a trend is shown.
4	**Green threshold**	The score above which the meeting is considered effective.
5	**Red threshold**	The score below which it is considered ineffective.
6	**Status after evaluation**	By default, the meeting moves to the “Closed” status.

💡 **Don't change everything at once**

The default values suit most organisations. Start with them, then adjust the thresholds after a few weeks, in the light of the first evaluations.

✋ YOUR TURN Set up meetings

1. Gear wheel, **Company settings**, **Meetings** card.
2. Check the limit for recurring meetings and the evaluation period.
3. Confirm or adjust the green and red thresholds.

☐ **Tick when done!** Expected result: the meeting rules are set for the whole organisation.

🎉 **Phase 1 complete: your account is ready!**

It carries your colours, it is secure, AI and meetings are set up.

➜ **Next chapter: Create users**. Time to open access!

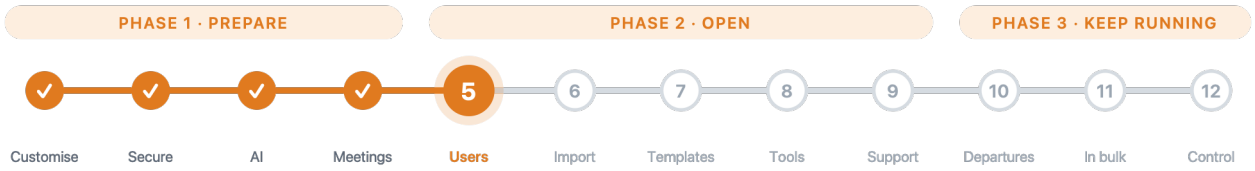
📘 **Learn more in the Academy**

- Evaluate a meeting

PHASE 2 · OPEN ACCESS 20 minutes

Chapter 5 · Create users

Create accounts and assign the right licences



The account is ready: over to the users! You create their accounts and choose for each person the licence that matches their role.

By the end of this chapter, you will know how to…

- ✓ choose the right licence for each person;
- ✓ create a user;
- ✓ find and export the list of users.

Licences

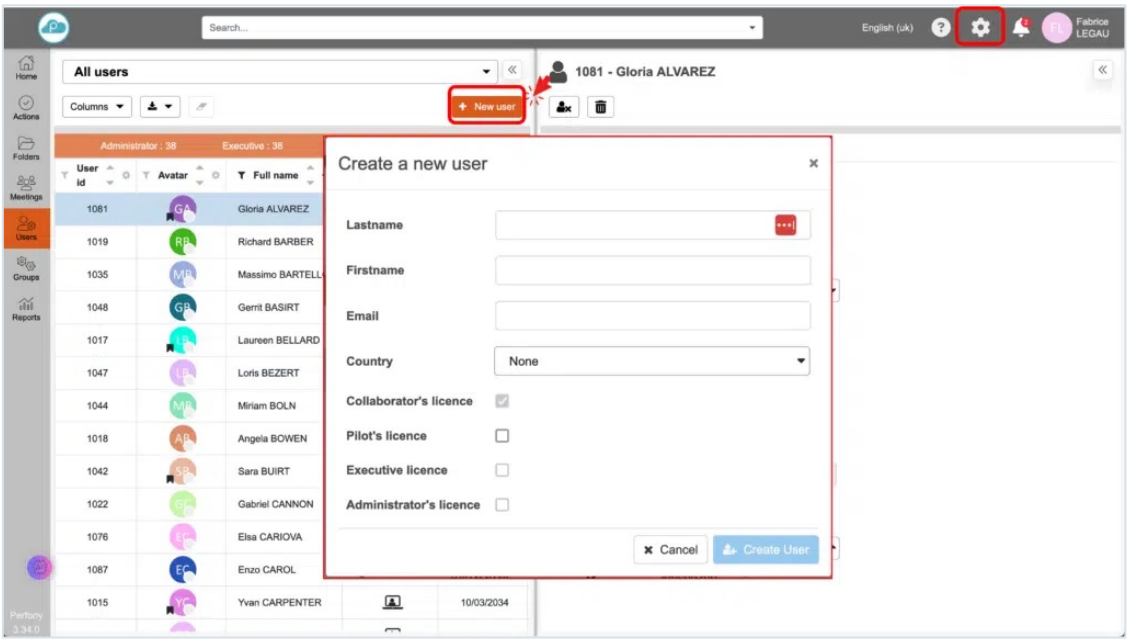
- **Collaborator**: works in the folders and meetings they are invited to, moves their actions forward and comments. Does not create folders or meetings.
- **Pilot**: can also create and run folders and meetings, manage folder templates and dashboards. Ideal for managers and project managers.
- **Executive**: can also manage folders in bulk and be given administrator rights. For Perfony leads and senior managers.

Depending on your organisation's plan, not all licences may be available. To change your licences, contact your Perfony representative.

> **The right licence**
> Give each person the licence they need, no more, no less. You can always upgrade it later: that's simpler than taking rights away.

+ Create a user

Users menu, on the left, then **+ New user**. Enter the surname, first name, email address and country, then tick the licences. When you confirm, the person receives an email to create their password and discover Perfony.



The user creation window, opened from the Users menu.

> **Lots of users to create?**
> Use the Excel import instead (chapter 6). Careful: the import does not send an email, so it's up to you to let people know (chapter 9).

The list of users

- The drop-down menu at the top of the list shows **all users**, those in your folders and meetings, or a **licence summary**.
- Add or remove columns, sort and filter. Remember the **eraser** to clear the filters.
- The download button exports the list as **CSV**, to open in Excel.

✋ YOUR TURN Create a first user

1. **Users** menu, then **+ New user**.
2. Enter a colleague's surname, first name, email and country.
3. Tick the **Pilot** licence if this person needs to create folders, then confirm.
4. Open the **licence summary** to check the count.

☐ **Tick when done!** Expected result: your colleague has received their invitation email and appears in the list.

🎉 **Chapter 5 complete!**

➜ **Next chapter: Import what you already have.**

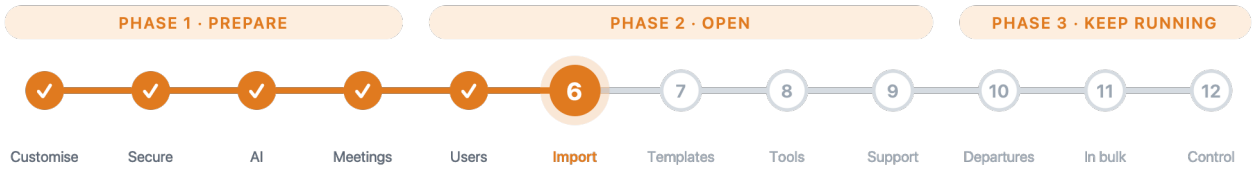
📘 **Learn more in the Academy**

- Manage users · Licences · Roles

PHASE 2 · OPEN ACCESS ⏱ 20 minutes

Chapter 6 · Import what you already have

Bring in users, folders, actions and meetings from Excel



Do your teams already have lists, projects and action plans in Excel? No need to type everything again: Perfony imports them from Excel templates.

🎯 **By the end of this chapter, you will know how to…**

- ✓ import users, folders and meetings;
- ✓ import an action plan into a folder;
- ✓ do the imports in the right order.

🔢 In the right order

Each import builds on the previous one: a folder needs its participants, an action needs its folder and its person responsible. So follow this order:

1. **Users**: gear wheel, then **Import users**.
2. **Folders**, with their themes: gear wheel, then **Import folders**.
3. **Actions**, folder by folder: from the folder's menu (see below).
4. **Meetings**: gear wheel, then **Import meetings**.

For each import, you do everything yourself, from the same menu: **download** the Excel template, **fill it in**, then **import it**. There is nothing to send to Perfony.

> ⚠️ **Imported users don't receive an email**
> Unlike creating users one by one, the import does not send an invitation. Let people know yourself: you will find a template message in chapter 9.

📥 Import an action plan

1. In **Folders**, click the folder's **…** menu, then **Update actions**.
2. Download the **XLSX action import template** and paste your actions into it. The first 3 columns, in red, are required; the folder, status, person responsible and priority are chosen from lists.
3. Save the file, then choose **Import actions from the XLSX template** and select it.

A progress bar, then a success message, confirm the import.

> 💡 **A large volume to bring in?**
> First do a trial with a few lines, in a test folder. Once you have checked the result, import the rest.

✋ YOUR TURN Import a test action plan

1. Create a “Test import” folder and open its **…** menu, then **Update actions**.
2. Download the template and fill in three actions.
3. Import the file and check the folder's action plan.

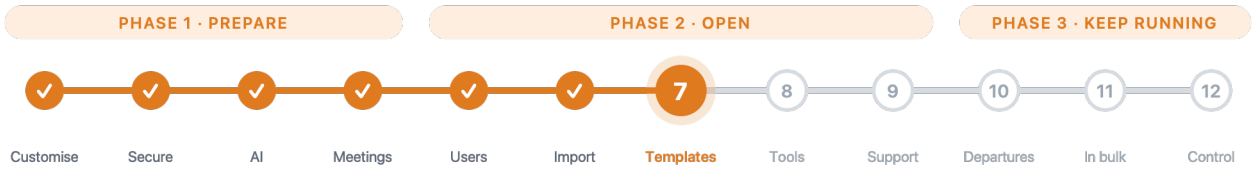
☐ **Tick when done!** Expected result: the three actions appear, with their person responsible and their due date.

> 🎉 **Chapter 6 complete!**
> → **Next chapter: Prepare folder templates.**
>
> 📘 **Learn more in the Academy**
> - Import an Excel action plan · Manage users

PHASE 2 · OPEN ACCESS ⏱ 15 minutes

Chapter 7 · Prepare folder templates

Groups, custom fields and templates: best practice



Folder templates give your teams a common framework: the same information tracked on actions, the same rights rules. It's best to prepare a few before the launch.

> 📘 **The step-by-step is in the user guide**
> Creating a group, a custom field, a template and a tailor-made Kanban: it's all explained in **step 8 "Structure"** of the "Getting started with Perfony" guide. This chapter gives you the best practice to know before you start.

> 🎯 **By the end of this chapter, you will know how to…**
> - ✓ organise groups and choose their managers;
> - ✓ design reliable custom fields;
> - ✓ choose the rights on actions for each template.

👥 Groups that reflect your organisation

- Create one group per **department** (quality, IT…) or per **brand** if your organisation has several. Templates shared by everyone go in the main group, a department's templates in its sub-group.
- Appoint a **manager** for each group, often the head of department or the project manager: they create and develop the templates. The others are **members** and use them.
- Managers and members need a Pilot or Executive licence.

Reliable custom fields

- **Prefer a fixed list** to free text: no typos, no duplicates (“Quality”, “quality”, “Qualty”…), and filters, charts and Kanbans that work.
- **The number type** suits budgets and durations. A parent action's value can be calculated from its sub-actions.
- **Number your fields** to control their order: beyond 9 fields, write 01, 02… so that 10 doesn't sort before 2.
- Depending on your needs, make a field **required** when the action is created or closed, **hide it from search** or have it **carried over to sub-actions**.

Rights on actions

- **Default**: flexible and collaborative. This is the setting we recommend for most folders.
- **ISO**: restricted. Participants only update progress and comment. Useful for management or certification folders.
- You can also create **your own configuration** of rights, in the Groups menu.

> **For quality approaches**
> The folder template can also switch on action audit, and the Groups menu root cause analysis. The auditor role is then assigned by an Executive user.

YOUR TURN Prepare your first template

1. With a head of department, list the information to track on their actions: phase, site, type, budget…
2. Create the department's group and appoint its manager.
3. Create the fixed-list fields, then the template, with “Default” rights.
4. Apply it to a pilot folder and get feedback from its team.

☐ **Tick when done!** Expected result: a first template is ready, tested by a team before being rolled out.

🎉 **Chapter 7 complete!**

➜ **Next chapter: Roll out the tools.**

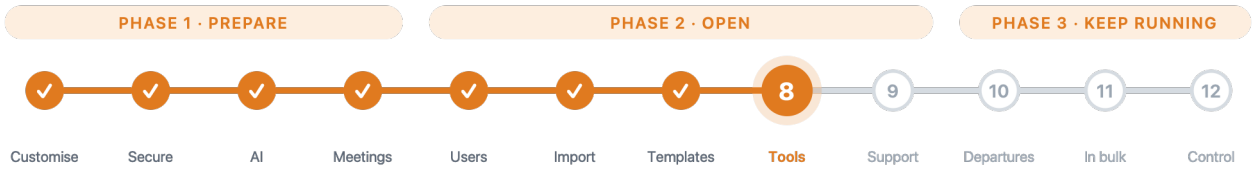
📘 **Learn more in the Academy**

- Purpose and creation of a group · Group members · Sub-groups
- Custom fields · Folder templates
- Rights on actions · Audit · Root cause analysis

PHASE 2 · OPEN ACCESS ⏱ 20 minutes

Chapter 8 · Roll out the tools

Outlook, Teams, Microsoft 365, Google and AI assistants



Perfony integrates with your teams' tools. Most of these integrations require your IT department to step in: prepare this before the launch, with the Perfony project manager.

> 🎯 **By the end of this chapter, you will know…**
>
> - ✓ which tools to connect to Perfony;
> - ✓ who needs to step in for each one;
> - ✓ in what order to organise the rollout.

🧭 Overview

Tool	What it brings	Who installs it
Microsoft 365	Single sign-on (SSO) to Perfony, Teams and the Outlook add-in; OneDrive and SharePoint documents; Teams member synchronisation.	Your IT department, in Microsoft Entra ID (see chapter 2)
Outlook add-in	Create an action from an email; synchronise Outlook meetings with Perfony.	The Microsoft 365 administrator, through centralised deployment
Teams	A Perfony tab in channels; create an action from a conversation.	Each team adds the tab; member synchronisation requires Microsoft 365
Google Workspace	Login with a Google account; Google Drive documents.	The Google administrator, in the Google Cloud console
Copilot agent	Manage your Perfony actions by chatting with Microsoft 365 Copilot.	The Microsoft 365 administrator (for everyone) or each user
Claude	Read and update your actions, folders and meetings from Claude.	Activation to request from support@perfony.com, then each user

Calendars	Perfony meetings and actions in Outlook, Google Calendar or a CalDAV client.	Each user, from the Meetings menu

📧 The Outlook add-in, in detail

- It is deployed **centrally** by the Microsoft 365 administrator, from the Admin Center (Integrated apps), using the “Perfony for Outlook” listing on Microsoft Marketplace.
- An individual installation shows the Perfony button, but **does not create the Perfony meeting** when the invitation is sent: only centralised deployment allows this.
- It requires **Exchange Online** email (Microsoft 365): centralised deployment does not exist for an on-premises Exchange server.

💬 For Teams and Claude

- In Teams, the creator of a team can **synchronise its members** with the participants of a Perfony folder.
- For Claude, send support@perfony.com a request to activate the connector, with your account name (yourcompany.iperfony.com).

> 💡 **Data and AI**
>
> Perfony's AI connectors comply with the GDPR and the AI Act. Each assistant only sees what the user already sees in Perfony. The Academy details the data accessible and the controls available to you.

✋ YOUR TURN Plan the rollout

1. List the tools used in your organisation: Microsoft 365 or Google, Outlook, Teams, Copilot, Claude.
2. Send your IT department the matching Academy articles (see below).
3. Agree a set-up date with them and the Perfony project manager, before the launch.
4. Test each tool with a pilot user.

☐ **Tick when done!** Expected result: the tools are ready on the day your users arrive.

🎉 **Chapter 8 complete!**

→ **Next chapter: Support your users.**

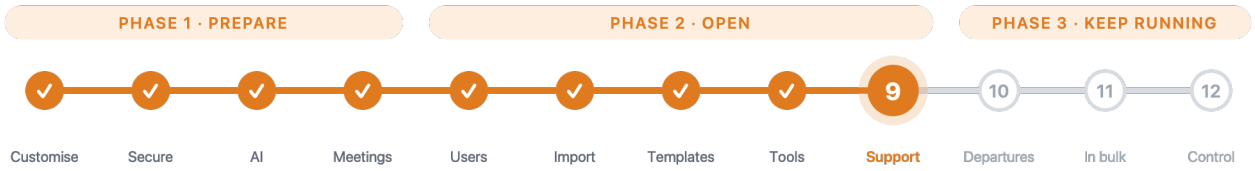
📘 **Learn more in the Academy**

- Connect Perfony and Microsoft 365 · Install the Outlook add-in
- Perfony in a Teams channel · SharePoint · OneDrive
- Connect Perfony and Google Cloud · Google Drive
- The Copilot agent · Connect Claude · Perfony in your calendar

PHASE 2 · OPEN ACCESS ⏱ 10 minutes

Chapter 9 · Support your users

A successful launch and first few weeks



A well-configured tool is not enough: it's the support in the first few weeks that makes the difference. Good news: you are not alone in this.

🎯 **By the end of this chapter, you will know how to…**

- ✓ announce the launch to users;
- ✓ share the “Getting started with Perfony” guide;
- ✓ keep adoption going in the first few weeks.

📣 Announce the launch

Users created one by one receive an invitation. Imported users don't: send everyone a launch message. For example:

✉️ **Template message, to adapt**

Hello, from [date], we will be following up our actions and meetings in Perfony. Your account is ready:

- *address: https://yourcompany.iperfony.com;*
- *login: your work email address;*
- *first login: click “Forgotten password?” to choose your password.*

To get started, follow the attached guide at your own pace. Any questions? [name of the Perfony lead] is here to help.

If your organisation uses login with Microsoft 365 or Google, replace the password line with “log in with your Microsoft (or Google) account”.

📗 Share the user guide

- Attach the **“Getting started with Perfony”** guide to your message. Everyone starts with level 1 (steps 1 to 3), then continues according to their role: pilots up to step 7, Executives up to step 9.
- The guide is also available from the **question mark** at the top of the screen.

🌱 Look after the first few weeks

- Appoint **leads**: one trained pilot per team, who answers the first questions.
- For some profiles, such as senior managers, you can choose a **dashboard as their home page**: in the Users menu, “Redirect page after login” setting.
- Remind people that the **Perfony assistant** (the bubble at the bottom left) and the **Academy** answer most questions.
- Hold a **review after one month**: what works, what's blocking, which settings to adjust.

✋ YOUR TURN Launch your account

1. Adapt the template message and send it to your users, with the “Getting started with Perfony” guide.
2. Appoint one lead per team.
3. Schedule a follow-up review in one month right now.

☐ **Tick when done!** Expected result: your users know how to get into Perfony, and who to turn to.

🎉 **Phase 2 complete: your account is open!**

Users are created, existing data is imported, templates and tools are ready, and the launch is announced.

→ **Next chapter: Manage arrivals and departures**. On to the account's day-to-day life.

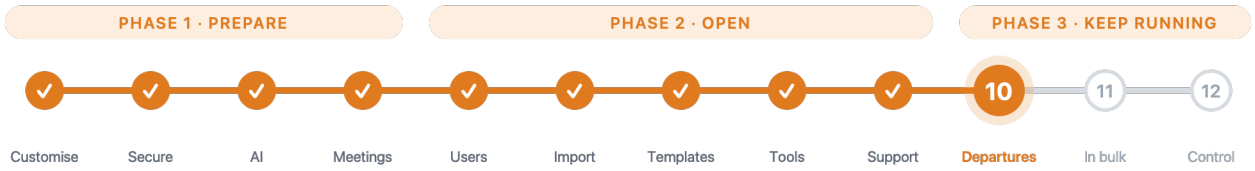
📘 **Learn more in the Academy**

- Get started quickly with Perfony · Show a dashboard as the home page
- The Perfony assistant · Your password

PHASE 3 · KEEP THE ACCOUNT RUNNING ⏱ 15 minutes

Chapter 10 · Manage arrivals and departures

Welcome, reorganise and deactivate without losing anything



Teams change: people arrive, change jobs, leave. Your role: make sure nothing gets lost, whether folder, meeting or action.

🎯 **By the end of this chapter, you will know how to…**

- ✓ welcome a newcomer;
- ✓ transfer a person's responsibilities;
- ✓ deactivate, reactivate or delete an account.

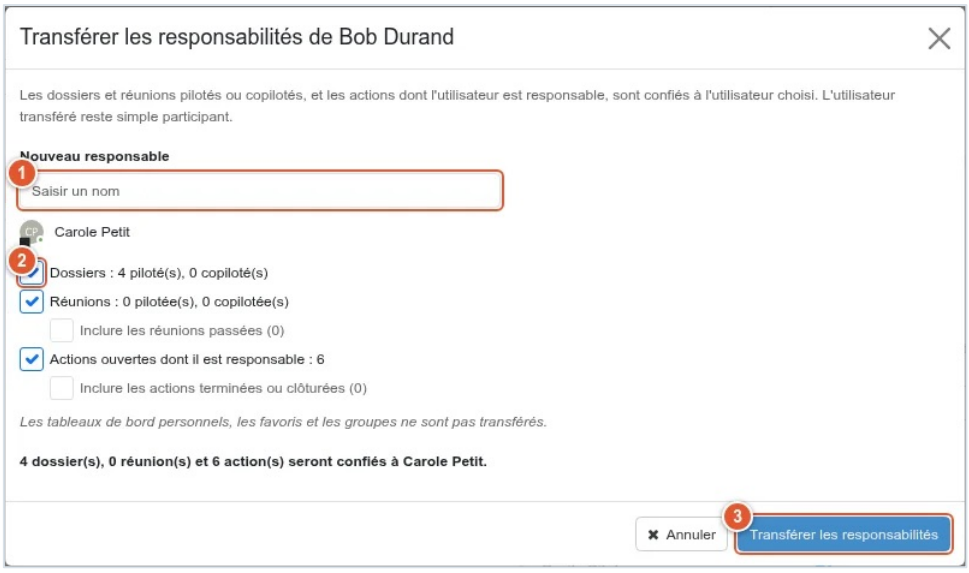
👋 An arrival

- Create the account with the right licence (chapter 5): the person receives their invitation.
- Add them to the folders and meetings that concern them, or ask their pilots to do so.
- Send them the “Getting started with Perfony” guide and the name of their lead (chapter 9).

🔁 A change of job or a departure

First of all, hand their responsibilities to someone else. In a single operation, the folders and meetings they pilot or co-pilot, and the actions they are responsible for, pass to the person of your choice.

1. **Users** menu: open the person's profile. At the bottom of the Information tab, click **Transfer responsibilities**.
2. Choose the **new person responsible** and check what will be transferred: folders, meetings, open actions.
3. Click **Transfer responsibilities**. The new person responsible receives a summary email.



1	**New person responsible**	An active user, with a Pilot licence to receive folders and meetings.
2	**What is transferred**	The volumes are shown. Past meetings and completed actions: only if you tick the options.
3	**Transfer**	Everything goes in one go. The person remains a simple participant in their folders.

Good to know

- The new person responsible is added to the folders and meetings they were missing from.
- Personal dashboards, favourites and groups are not transferred.
- Each change is recorded in the history of both user profiles.

Deactivate rather than delete

- **Deactivate**: the person can no longer log in, but remains visible in the folders, actions and meetings where they appeared. This is the right choice for a departure.

- **Reactivate**: in the list of users, filter the Status column on “deactivated”, choose the person and reactivate them.
- **Delete**: this is final. The person disappears from the database and their presence is anonymised everywhere. Keep this for specific cases.

Don't forget the automatic settings in chapter 2: deactivation of accounts unused for too long, then anonymisation.

✋ YOUR TURN Prepare a departure

1. Choose a test account, or a person who is really changing jobs.
2. Transfer their responsibilities to a pilot, checking the volumes shown.
3. In the case of a departure, then deactivate the account.

☐ **Tick when done!** Expected result: their folders, meetings and actions have a new person responsible, and access is closed.

🎉 **Chapter 10 complete!**

➜ **Next chapter: Manage in bulk.**

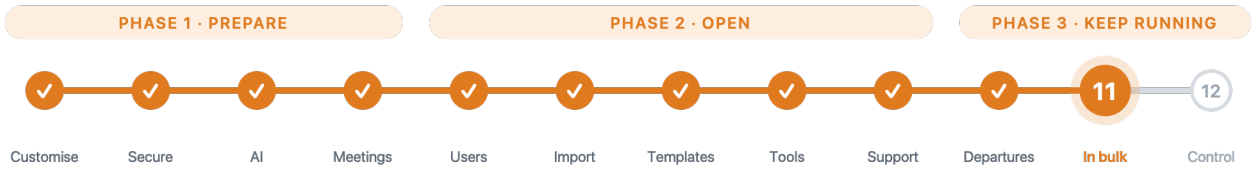
📘 **Learn more in the Academy**

- Transfer responsibilities · Manage users

PHASE 3 · KEEP THE ACCOUNT RUNNING 10 minutes

Chapter 11 · Manage in bulk

Change several users or several folders at once



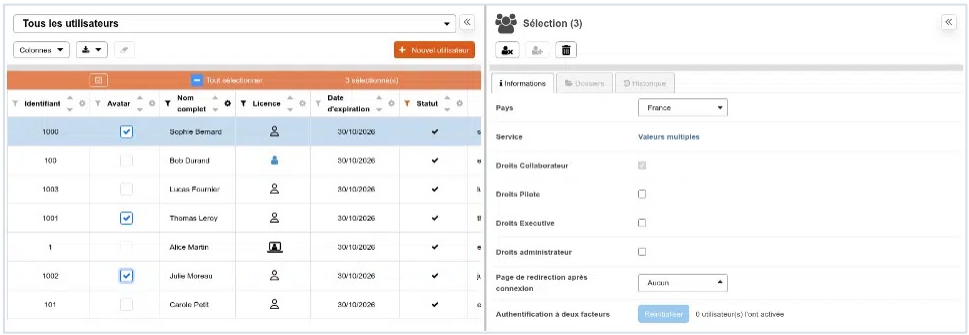
A reorganisation, a new department, a project coming to an end? No need to open profiles one by one: select, change, confirm.

By the end of this chapter, you will know how to…

- ✓ change several users at once;
- ✓ reorganise several folders at once.

Several users

1. **Users** menu: hover over an avatar and a box appears. Tick the people concerned, up to 200.
2. The right-hand pane becomes **Selection**: change the country, department, home page after login or rights.
3. A confirmation reminds you of the change and the number of people: confirm.



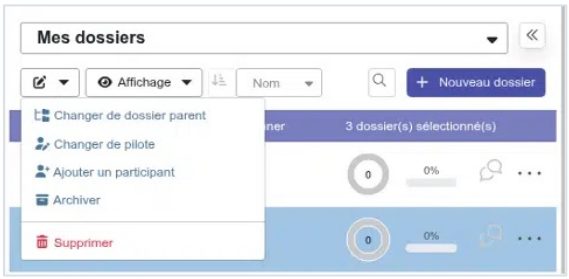
Three users selected and the Selection pane.

- The buttons at the top of the pane **deactivate, reactivate or delete** the selection, and you can also reset two-factor authentication.

- Rights are linked: giving the Executive right also gives the Pilot right; removing the Pilot right also removes the Executive and Administrator rights.
- Your own account cannot be changed in bulk.

Several folders

For Executive users only. In **Folders**, tick the folders (up to 200), then click **Update** (the pencil, at the top of the list) and choose the operation:



The Update menu for a selection of folders.

- **change the parent folder, pilot or folder template**: the former pilot becomes co-pilot;
- **add a participant** to all the folders at once;
- **archive**: careful, actions in progress are closed;
- **delete**: the folders go to the recycle bin, from where they can be reopened.

The result shows the number of folders updated, and names those that could not be, with the reason.

YOUR TURN Make a bulk change

1. In **Users**, select two test accounts and fill in their department.
2. In **Folders**, select two test folders and add the same participant to them.
3. Check the result shown, then the history of one of the profiles.

☐ **Tick when done!** Expected result: two changes, each made in one go, and recorded in the history.

🎉 **Chapter 11 complete!**

➜ **Next chapter: Control access.**

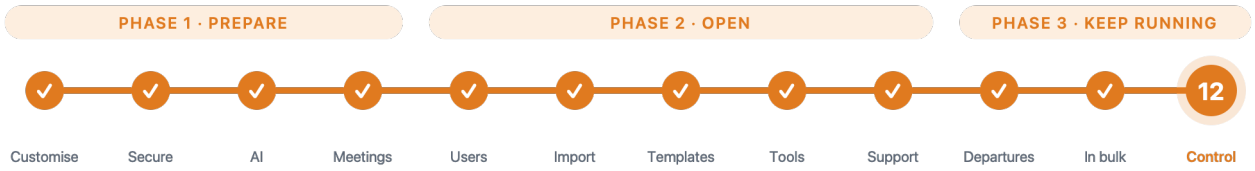
📘 **Learn more in the Academy**

- Manage several users at once · Manage several folders at once

PHASE 3 · KEEP THE ACCOUNT RUNNING ⏱ 10 minutes

Chapter 12 · Control access

Regularly check that everyone has the right rights



Over the months, rights pile up: a former pilot keeps their licence, an unused account stays open. A regular check keeps your data confidential and limits the risks.

🎯 **By the end of this chapter, you will know…**

- ✓ how to get the full list of access rights;
- ✓ what to check, and how often.

📊 The access report

Ask Perfony support for the **IAM report** (identity and access management), at support@perfony.com. It lists, for each user:

- their identity, department, country and licence;
- their status, last login and last password change;
- the folders and meetings they take part in, with their role in each.

For a quick check between two reports, the **CSV export** from the Users menu is often enough (chapter 5).

🔎 What to check

- **Unused accounts**: no login for a long time? Deactivate them, or let automatic deactivation do it (chapter 2).
- **Licences**: does everyone still need their Pilot or Executive licence?
- **Administrators**: at least two, and only people who need it.
- **Sensitive folders**: the right people, with the right roles.

💡 **How often?**

One check a year is recommended, ideally when licences are renewed. Add a check after each major reorganisation.

✋ YOUR TURN Plan your access review

1. Ask **support@perfony.com** for the IAM report.
2. Review unused accounts, licences and administrators.
3. Correct what needs correcting, then note the date of the next review in your calendar.

☐ **Tick when done!** Expected result: access matches real needs, and the next review is planned.

🏆 **Congratulations, you have finished the Administrator Guide!**

Your Perfony account is prepared, open and in good hands for the long term:

- **Phase 1**: it is customised and secure, and AI and meetings are set up;
- **Phase 2**: users, templates and tools are in place, and the launch is done;
- **Phase 3**: you know how to handle staff changes, work in bulk and control access.

📘 **Learn more in the Academy**

- Control user access and permissions · Security settings

Appendix A · Who does what?

What each licence lets you do. An administrator always has an Executive licence, plus administrator rights.

	Collaborator	Pilot	Executive	Administrator
Follow up and move your actions forward, comment	✓	✓	✓	✓
Create and run folders and meetings	—	✓	✓	✓
Create dashboards and reports	—	✓	✓	✓
Create folder templates (group manager)	—	✓	✓	✓
Create users from a folder, if allowed	—	✓	✓	✓
Manage several folders at once	—	—	✓	✓
Assign the auditor role	—	—	✓	✓
Manage users and licences	—	—	—	✓
Set up the account: security, AI, meetings, logo	—	—	—	✓
Import users, folders and meetings	—	—	—	✓
Transfer a user's responsibilities	—	—	—	✓
Manage subscription billing	—	—	—	✓

Group managers are Pilots or Executives chosen for each group (chapter 7).

Appendix B · Administrator quick reference

Where to find each setting, on a single page.

SET UP THE ACCOUNT	
Open the settings	Gear wheel › Company settings
Change the logo	Gear wheel › Company logos
Two-factor authentication, passwords	Company settings › Security card
Switch AI on or off	Company settings › Third-party software: artificial intelligence
Set up meeting evaluation	Company settings › Meetings card
MANAGE USERS	
Create a user	Users › + New user
See the licence count	Users › drop-down menu › licence summary
Export the list	Users › download button › CSV export
Import users	Gear wheel › Import users
Unblock two-factor authentication	User profile › Reset two-factor authentication
Transfer responsibilities	User profile › Transfer responsibilities
Deactivate or reactivate	User profile, or Status filter “deactivated”
Change several users	Users › tick the avatars › Selection pane
FOLDERS AND DATA	
Import folders and meetings	Gear wheel › Import folders, Import meetings
Import an action plan	Folder's … menu › Update actions
Change several folders	Folders › tick the folders › Update
Get the access report	Request to support@perfony.com

Appendix C · Where to find help

You are never alone in administering your account:

📘 **The Perfony Academy**

All the step-by-step articles, including those for administrators: www.perfony.com/en/academy.

🤖 **The Perfony assistant**

The bubble at the bottom left of the screen answers your questions from the Academy.

✉️ **Perfony support**

A question, something blocking, the access report? Write to support@perfony.com.

📗 **Your users' guide**

“Getting started with Perfony” takes everyone from their first login to steering their activity. Read at least level 1: you will be able to answer your teams' first questions.

Happy administering! 🚀